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AN EVALUATION OF THE PRACTICES AND FUNCTIONS
OF THE CLERK OF THE BOARD OF EDUCATION
IN THE STATE OF UTAH

by

Dean C. Andrew

A thesis submitted in partial fulfillment of the requirements
for the degree of Master of Science in
Education

UTAH STATE AGRICULTURAL COLLEGE

June
1947

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PART ONE

INTRODUCTION

Regardless of the size, the school district has some person who is responsible for keeping the clerical and financial records of the school district. This position is very frequently designated as the office of the clerk of the board of education. When the efficient clerk assumes the clerical and financial duties of the school district the superintendent is relieved of endless details, which allows him greater opportunity to perform those functions for which he is qualified, thus a smoother and a more efficient school system is the result. It has been thought in the past that any person regardless of experience or training could handle the clerical and financial details of the school district. While a great amount of progress has been made, there is still a further need for clarification of: the duties of the clerk, the clerk's relationship to the superintendent and the board of education, and the qualifications of the person assuming the office. Literature from such authorities as Wivel (38), Chambers (4), Parmenter (26), Reeder (30), Roberts (33), and DeYoung (13) show that while there are probably many school board clerks performing their work efficiently and well, many school systems could be improved by the selection of more qualified and competent clerks. There is agreement among school administrators that the clerk should have a high degree of training for his specialized work and that the office should be raised to a professional level where the tenure and salary would be commensurate with the qualifications and responsibilities exacted of the office.

There seems to be an urgent need for a study to be made now on the practice and functions of the clerk of the board of education in the state of Utah. Only by evaluating the practices and functions

of the clerk at present can improvements be projected into the future. It is felt that if a method of evaluating the functions and practices of this office were formulated and used, then a better and more efficient school system should result.

It is the purpose of this study to evaluate the present functions and practices of the clerk of the board of education with a desire that such an evaluation may serve as a guide for improvements in the services performed by the clerk. In addition it is assumed throughout this study that a more efficient school system will result by the employment of qualified clerks and by the proper selection and designation of their functions.

Delimitations - This study covers the present general practices and functions of the clerk of the board of education. The past practices of the clerk will not be considered, and the future practices will only be considered to suggest improvements if it is found that the present practices are lacking in conformity with the accepted principles used as criteria.

The number of principles derived from various educational authorities provided a limitation. To get educational authorities to agree on items that could be used as criteria is a problem within itself. An item was not used as criteria if a significant amount of disagreement was manifested. Also, where some school administrators fail to mention a particular item it is difficult to determine whether or not it should be used as an accepted principle. The principles used, therefore, will be those items where the greatest number of authorities mentioned and agreed on any specified responsibility.

Another limitation arises from the method of collecting the data. The questionnaire was used and it has certain limitations. Some of the

recipients of the questionnaire fail to return them; and, again, the recipient may not interpret each question as the author wishes it to be interpreted. The questionnaire was made as objective as possible to remove erroneous answers. However, tabulation will be made on actual returns and a guess should and will not be attempted on unreturned data. There will arise certain variations due to the size of districts which will provide a further limit on the minute degree of tabulation.

The final limitation is that very few studies have been made of the clerk of the board of education. Whenever a new field or phase of work is approached, there arises a limit of how well one study can adequately cover the subject.

Terminology

Clerk of the board of education - The clerk is the officer who acts as secretary to a corporation, and who has charge of the clerical, statistical, and financial work of the district educational office.

Business manager - According to Cubberley (7, p. 375), "The purpose of the business manager is to look after the business and clerical affairs of the school department along lines that are business-like and economical both in time and money." The duties of the clerk and the business manager are one and the same. Because of the similarity of their duties, especially in small and medium size school districts, the term business manager will be used synonymously with the clerk of the board of education.

Secretary of the board of education - Smith (34, p. 56) states, "Since a board of education is a corporate body, it must have a recording officer. The title of such an official is usually secretary or clerk." According to Peters (27) every school board in the United States

has a clerk or a similar official with another title, such as clerk-treasurer, secretary, secretary-treasurer, or business manager.

The above definitions were given to point out that some authorities use one term and other authorities use other terms, but for the purpose of this paper the clerk, business manager, and the secretary shall be the same.

Historical development of the office of the school board clerk - According to Drake (14) Connecticut passed an act in May, 1794, appointing, encouraging, and supporting schools. This act gave authority to each of the school districts in the state to choose and specify the essential duties of the school board clerk. Other states soon followed, New Hampshire 1805; New York 1812; Virginia 1818; Ohio 1821; Maine 1821; Rhode Island 1828; and Vermont 1827. Drake (15) points out that since the early beginning of this office legal requirements and general practices have constantly increased the duties that must be performed by the clerical agent of the governing board. With the increase of population in the country, the increase in public-school attendance, the enlargement and complexity of the financial problems involved have caused the responsibilities and functions of this office to multiply many times. The efficiency and success of the educational program in any district is becoming more and more dependent upon the business accuracy and penetration of the clerical agent of the controlling board. The office of clerk is now required by legislative enactment in all of the school districts of all of the states in this country. This office is most often designated as the clerk of the board of education. The duties of this office have become very important and diversified.

Specific historical evidence about the office of the clerk of the board of education for the state of Utah was not obtainable by

the writer. No data had been compiled as far as can be ascertained. In Utah the clerical agent of the board of education goes by the title of the clerk of the board of education. The more essential duties of the clerk are specified by law, but the clerk performs many more duties than these. A study on the clerk of the board of education is a relatively new field of study. If, as a result of this study, historical evidence concerning the clerk of the board is brought forth this study will have proved of some value.

Sources of data - The data for this study were obtained from a variety of sources. The legal status of the clerk of the board was taken from the school laws of the state of Utah as of the year 1945 (35). The criteria used in the evaluation process were procured through principles that were accepted by: (1) leading authorities in school administration and school business administration; (2) outstanding school board clerks in the field, who were actually performing the duties; and, (3) studies made of the clerk of the board of education or business manager of the school district. Data concerning Utah practices were secured by means of a questionnaire which was sent to each district in the state of Utah and which included material for each and every clerk of the board in the state. The questionnaire was formulated to conform with a check list of principles that are accepted by leading school administrators. Material, other than manuals of instruction, pertinent to the office of the clerk for respective districts was requested, but apparently there has not been much printed concerning the office as no literature was received by the author.

PART TWO

REVIEW OF LITERATURE

A great number of authorities have written literature concerning the clerk of the board of education, but the amount is small and incidental to other problems of school administration. Outside of the studies on the clerk, the writer was unable to find any great quantity of material concerning the clerk from one particular textbook. However, the recognized authors of literature should be mentioned regardless of the quantity given.

The American Association of School Administrators, (1), published the yearbook, "School Boards in Action". This publication gives the significant trends in school board organization, and includes the clerk in the survey. One of the best sources of aid for the clerk in the state of Utah is a "Handbook for Utah School Board Members" prepared by Campbell (2). This handbook gives aid to the clerk in his duties and in his relationship to the superintendent. Chancellor (5) gives a brief summary of the duties of the clerk. Probably one of our most nearly adequate and best sources of material on the clerk of the board of education and school administration is Cubberley (7), (8) and (9). Cubberley is recognized as one of the foremost leaders in school administration, and in each textbook he devoted space to the clerk; his duties, methods of selection, etc. Deffenbaugh (11) (12), under the jurisdiction of the U. S. office of Education, published a report on a 1921 survey of the clerk of the board. These data were compared with a 1915 survey on the same office. Engelhardt and Engelhardt (16) wrote what is probably the most extensive volume on "Public School Business Administration". This textbook is often referred to as the "Bible" for school business officials.

It covers practically every phase of business administration, with an available score card to check the efficiency of certain school business officials. In the textbook "The Administration of American Education" by Graves (20), the organization of the Oakland California school business department is presented with emphasis on the training needed and the duties of the business manager or clerk. Reeder (29) points out the need for more efficient business employees. Reeder also gives the administrative organization of the Chicago and Cincinnati school systems. The qualifications that the business executive should have, how the business executive should be selected, salary and tenure that should go along with such selection were also discussed by Reeder. Another outstanding administrator, Smith (34) gave the duties and methods of selection of the clerk of the board in his book, "Business Administration of Public School". There have been many surveys made of the educational system of a state. One of the most recent was in the state of Washington which was conducted by Strayer (36). He points out the erroneous practices of the clerk of the board of education in that state and makes recommendations for improvement.

There are numerous magazine articles concerning the clerk of the board or some phase of his work. It would be neither appropriate nor of especial value to go into all of them here. It should suffice to mention those magazines where the greatest number of articles appear. Many of these articles have been written by outstanding men in the field of school administration and outstanding clerks in the field. The magazines publishing such articles are: "School Executive", "Educational Administration and Supervision", "School Review", "Nation's Schools", and "School Management".

It has been found through various studies that school board clerks are performing multifarious duties. There is no uniformity of duties specified by law or of those actually performed. There are two schools of thought in regards to the clerk's relationship to the superintendent and the board of education. In one the clerk is directly responsible to the superintendent and in the other the clerk and the superintendent are coordinate and both are directly responsible to the board of education. Practically all authorities agree that the unit type of educational organization, where the clerk is directly responsible to the superintendent, is more efficient. It is recommended that the office of clerk be put on a professional level with colleges and universities providing training necessary for the position. The clerk should be assigned definite functions with the salary and tenure of the position comparable with the qualifications and responsibilities of the office.

The four studies to be given special consideration in this paper are by Corse (6), Drake (15), Heer (21), and Peters (27).

Corse (6) secured his data through correspondence with various officers of the National Association of Public School Business Officials, leading educators in school administration, and state department of public instruction of the United States. The other sources Corse used were professional books and magazines and a questionnaire sent out to superintendents and business managers.

The data were organized on the basis of individuals furnishing them; mainly data from, (1) men in the field of school business administration who are recognized as authorities; (2) superintendents who employ business managers; (3) superintendent-business manager; and (4) school business managers.

When 55.3 per cent of the authorities, superintendents, and busi-

ness managers agreed on an item, that item was established as a standard for qualification of public school business managers. Corse found that the opinions of public school business officials were not at all consistent on determining qualifications of the business manager. Standards for qualifications used were: experience as a teacher, business experience, knowledge of: school management, school budgeting, purchasing school supplies, distribution of school supplies, storage of school supplies, school bonds, school taxation, school accounting, planning and constructing buildings, school architectural services, selecting school sites, financing capital outlay, making school inventory, cost accounting, school personnel, school transportation, and school survey.

Standards for duties and responsibilities that should be delegated to the business manager were set up in the same manner as qualifications. The delegated duties and responsibility standards used were: compiling budget, keeping daily budget, assessing and collecting taxes, scholastic enumeration, transportation reports, high school tuition reports, maintenance operation, financing the construction of new buildings, keeping insurance accounts, keeping school records that do not pertain to child accounting, preparing the payroll, and serving as purchasing agent as specified by the budget.

Corse compared standards with actual practices and made recommendations, applicable to Texas, that the business manager have permanent tenure. Then certain qualifications and certification could be prescribed in order to obtain the position. This study concludes that the business manager should be assigned certain definite functions.

Drake (15) was probably the first person to make a comprehensive survey on the office of the clerk of the board. He made a three phase

treatment of the office. The three phases were: (1) historical, (2) legal-status, and (3) present conditions, which included powers and duties as found in practice, and personal opinions concerning the office. Drake studied the legal provision for the office in all 48 states. His sources of information were early session laws of various states, various state histories of education, and the present school code.

The qualifications, duties, and powers of the school board clerk, as specified by school codes, were compared with the actual practices of the clerk. It was found that the clerk of the board fulfilled all legal obligations of the office and many other duties which were assigned to him. A portion of Drake's study was devoted to personal opinions about the office of clerk of the board which were submitted by the clerks themselves.

As a result of his study, Drake made several recommendations concerning the office of clerk of the board: (1) The office of clerk of the board of education should be dignified and be given definite professional standing. (2) In order to reach professional status more adequately prepared individuals should be secured to fill this office. Some certification of clerks should be made by some acceptable accrediting agency, either state or nation wide. Training for this position should be provided in colleges and universities on the undergraduate and graduate levels. (3) The unit type of organization should exist where the clerk is responsible to the superintendent. It was recommended by Drake that all legislation which makes a dual type of organization mandatory be repealed. (4) It was recommended that the tenure of office of the clerk be extended and that the salary be made more nearly comparable to the services and responsibilities which are exacted of the office.

The first nation-wide survey of a school business official was made by Heer (21) in 1926. Heer compared principles of industrial management and types of industrial organization with that of principles of school management and types of school organization. Heer states, "Superintendents become clerks and purchasing agents when they are supposed to be educational experts". Out of 206 cities studied, only 83 had printed rules and regulations; 91 did not have printed rules and regulations; and 32 did not make a reply to the question. Heer made the comment that such a situation was indefensible. It was found that there was a variety of titles used among the business executives, that in dual and multiple organization business executives are nearly always nominated by the board of education; and in the cities where the unit type of organization existed, the business executive was nominated by the superintendent in the majority of the cases.

The study went on to determine the functions, tenure, and salary, and from what occupations the business executives were selected. It was found that the largest number of business executives came from the school system itself.

As a result of this early study, it was pointed out that the unit type of organization was superior to the dual or multiple type of organization, and that the executive control should be centered in the superintendent of schools.

It was suggested that board records and financial accounting be separated from the business department and placed under the secretary of the board of education and of the superintendent of schools. Heer's study was limited to cities of 25,000 or more in population and may not be applicable to small districts.

Heer concludes that the tenure of the business executive should be

extended and our colleges and universities should provide courses that furnish training needed by the school business executive.

Peters (27) made a study in Pennsylvania which included 102 board of education secretaries. Peters classified his data into three categories; (1) district population under 2,500; (2) district population of from 2,500 to 4,999; and (3) district population over 5,000.

Peters went into minute details on the facilities of the secretary and covered this phase very thoroughly. It was found in Alleghany County, Pennsylvania, that the typical secretary's office was at his home. The secretary kept minutes in permanently bound minute books of nine by fourteen inches in size and cost less than five dollars. The secretary writes about 45 pages of minutes annually. He keeps financial records, insurance records, payroll, has books audited, posts a bond, and performs many other duties. He is also an important factor in the community contacts between the public and the school.

The legal proceedings affecting the secretary were given along with the duties that the secretary actually performed. Here again the comparison showed the secretary performs many more duties than are required by law.

Peters states, "The typical secretary, in all population groups, is a man 50 years of age. He has graduated from secondary school or business college. He gains his livelihood at clerical work. He may or may not have an avocation. If he has an avocation, it is likely to be found with the boy scouts, in church work, in athletics, or in hunting or fishing. He is married but has no children attending the local schools. He believes that the secretary should have clerical training, accounting ability, tactfulness, and a willingness to serve his community".

In his summary, Peters sets up a very fine manual for the use of secretaries of the board of education. It was fully applicable to the districts of Pennsylvania and could be used to a good advantage in every small school system.

PART THREE

PROCEDURE

The formulation of criteria to be used for evaluation was the first step undertaken in this study. The criteria were formulated through library research. Statements of leading school administrators, studies made on the clerk of the board of business manager of the school district, and practices of leading clerks in the field were the sources of the criteria. Criteria were formulated for the following practices of the clerk: (1) duties and responsibilities, (2) qualifications, (3) method of selection, and (4) the clerk's relationship to the superintendent and the board of education. The standards were derived from those items which the greatest number of authorities agreed upon.

A study of the clerk of the board of education in the state of Utah lends itself to the survey type of research technique much better than to any other. Duties and responsibilities, qualifications, methods of selection, and the clerk's relationship to the superintendent and the board are items which are easily obtainable by the circulation of a questionnaire.

In order to secure data as reliable and objective as possible expert advice was received and used in the construction of the questionnaire. Short and clearly worded questions were made asking for facts readily available. Answers which might reflect upon an individual were minimized or left out. A letter of contact written by Dean E. A. Jacobsen and a self-addressed stamped envelope accompanied each questionnaire. The assurance was made that all material furnished would be kept entirely confidential and a summary of result was

promised to those who desired it. To obtain all responses possible a follow-up post card was sent to all clerks who hadn't answered within three weeks. These clerks were promised additional questionnaires if the original had been lost or destroyed.

Thirty-five responses or 87.5 per cent of the questionnaires sent out were returned. The findings were tabulated and analyzed in the light of four factors. The four factors are: (1) Standards used as evaluating criteria. Only through comparison of actual practices with principles accepted by authorities can inefficiency be found and needed improvements projected. (2) Size of district. It can be expected that the duties of the clerk will vary with the size of the district. The limit or scope of the clerk's responsibility will depend upon the administration. The question may arise: Are the clerks of various districts using size of district as an excuse for nonperformance of certain duties which according to authorities are essential to every district? For this reason impetus is given to analyze this variable throughout the study. (3) Full or part time position. The importance attached to the office of clerk should be indicated by whether or not the district has a full time clerk. Some districts may assume that the duties of the office do not require a full time employee, and that any person could perform the duties of the position. This may lead to unqualified persons being responsible for the clerical and financial affairs of the school district. (4) Mode of appointment. If the clerk is directly responsible to the board, his duties and practices will vary from those clerks who are under the jurisdiction of the superintendent. The relationship may result in coordinate responsibility and a division of policies. Only where cooperation and union exist and all work for the same goal can the maximum of efficiency be achieved.

Additional factors were used in comparison with some of the data obtained, but all data received were compared with the above four factors wherever possible.

Practices that were not in conformity with the established standards were pointed out, and recommendations for improvement were suggested.

The conclusions in this study are reliable insofar as the method of obtaining and summarizing the data are dependable. It seems to the writer that most of the ordinary criticisms of the survey technique are directed against its misuse rather than its right use.

PART FOUR

CRITERIA FOR EVALUATION OF PRACTICES AND FUNCTIONS
OF THE CLERK OF THE BOARD OF EDUCATION

Literature in the field of school administration and school business administration has been used as the basis for the establishment and justification of the criteria for evaluating the practices and functions of the school board clerk. The data from this study will be analyzed in the light of these standards.

I. The Clerk of the Board of Education Shall Give Bond in Such Sum as the Board of Education May Determine.

Inasmuch as the clerk will handle the finances of the school district, he should be required to post a bond. The size of the bond should be in proportion to the amount of money handled, and not just a fidelity bond for faithful performance of his duty. This is a protection for himself as well as the people he serves.

(2) (8) (9) (14) (15) (16) (17) (23) (24) (27)

II. The Clerk of the Board of Education Shall Take the Oath of Office and Administer the Oath to New Members of the Board of Education.

The clerk may also be called upon to administer oaths to any persons filing claims or bills against the board of education. In many districts persons who have claims against the board of education are required to have them signed by a notary public. In either case the requirement should be followed as closely as possible. The clerk of the board may also be required by law to administer the oath to various other officials.

(9) (17)

III. The Clerk of the Board of Education Shall be Responsible for All Secretarial Duties Connected with His Office.

The office of clerk originated out of someone acting as clerical agent for the governing board of the school. This practice has been handed down until now. The clerk has many secretarial duties in addition to the original clerical ones. The clerk will handle official board correspondence, including the notification of all interested parties of board action. Duties pertaining to statistics will also fall upon the clerk.

In small districts the clerk may also be the superintendent's secretary. Many of the secretarial duties may come under the supervision of the superintendent, but the actual work is performed by the clerk of the board or persons to whom he may delegate it.

(5) (6) (7) (8) (9) (1) (14) (15) (16) (24) (27) (31) (34) (41)

IV. All Legal Matters Relating to Real Estate, Insurance, or Personal Property of the School Department Are Under the Jurisdiction of the Clerk of the Board of Education.

Many items concerning school property will arise in every school district. It seems that accidents or other legal matters arise regardless of careful planning. School property should always be insured. The clerk of the board should handle such matters, under the jurisdiction of the superintendent.

If the clerk is to control legal matters, he should know the laws relating to the schools and should consult the school attorney if the occasion arises.

(1) (6) (7) (14) (15)

V. The Clerk of the Board of Education Shall Certify All Documents That Require Certification.

There will be many documents that must be signed by the clerk

of the board in order to make such documents valid. The clerk should attest to the signature of the president or chairman of the board upon contracts, notes, diplomas, etc., and the clerk should certify all copies of board resolutions. In many districts the clerk may be called to certify taxation requirements, and school election returns. In other districts the county clerk may assume this responsibility. The clerk should attest in writing the execution of all deeds that must be executed by the board of education. In fact, it is essential that all important documents be certified in writing and not merely by verbal response.

If the above standard is adhered to, it will serve as a check and double check. This will relieve the responsibility upon a single person, and will render the documents more valid in the eyes of the law if the occasion ever arises.

(5) (12) (14) (15) (27)

VI. The Responsibility of Taking the School Census and All Inventories Rests Upon the Clerk of the Board of Education.

In order to have an efficient school system, systematic records must be kept on all things. The clerk will see that an inventory is taken on school facilities and property, and will file the records of such inventories in his office. These inventories should be taken annually to insure highest efficiency.

It will be the duty of the clerk of the board to see that an annual school census is taken. In school districts where there is an influx of transient personnel year in and year out this duty is imperative. Only when the district knows the number and kind of children in their schools can the school system perform its duties correctly. In order to get active results of the census and inventories, the

clerk of the board should give the returns to the superintendent to use as he sees fit.

(5) (12) (17) (38)

VII. Activities of An Administrative Nature Are Often Delegated to the Clerk of the Board of Education.

The clerk of the board is a representative of the board, and at times the board will delegate administrative duties to the clerk. Smith (34) points out that if the clerk is performing administrative duties, he has been made an executive officer and should be treated as such. The clerk may call meetings of the board under certain conditions; and, if an emergency arises, he will be delegated to call the meeting.

Many administrative duties will be delegated to the clerk after consultation with the superintendent. The clerk will make suggestions or recommendations to the superintendent and in turn the superintendent will delegate to the clerk the administrative power to carry out such recommendations.

(14) (15) (34)

VIII. The Clerk of the Board of Education Shall Act as Financial Agent of the Board and Shall Assume All Duties Connected with It.

In their yearbook the American Association of School Administrators (1) say that the classification of accounts as established by the United States Office of Education, as well as judgement of local competent accountants, should be used in setting up a system of books that will fully protect both the moral and the financial responsibilities of the members of the board of education so far as legally possible.

The clerk of the board is the responsible person to keep accounts and books of all financial transactions of the school departments. In conjunction with the superintendent he will prepare a tentative budget for the school district and will submit the tentative budget to the county commission. Bills or claims for materials shall be approved by the clerk. This will include making up and approving the teachers payroll. If the clerk is also the treasurer, he shall draw up and sign warrants for all money paid out. If the clerk is not the treasurer, he will countersign all warrants drawn up by the treasurer.

Regarding the payment of claims, Campbell (2) suggests that if the clerks were instructed to list each claim by payee, amount, warrant number, and budget item; and, if the clerk and superintendent certified that the claims were covered by the budget and materials had been received, board approval might be more prompt and more efficient.

The clerk should keep his books in such a manner that they will show at all times the condition of any fund within the county school system.

Some of the other specific financial duties that will be the responsibility of the clerk are: approving and signing school board contracts, keeping an account with the tax collector, and to give a report at every board of education meeting of the account of taxes and finances.

(1) (4) (5) (6) (7) (8) (9) (12) (14) (15) (16) (17) (20) (24) (26)
(28) (27) (29) (30) (31) (33) (36) (37) (38)

IX. The Clerk of the Board of Education Shall Have the Books of His Office Audited Every Year.

In order to protect the public, the board of education and the

clerk, a yearly or continuous audit should be taken of the clerk's books. An audit offers protection in the fact that it is a check of how much money, where, and when such money was spent. A clerk, who is holding his position and looking for what graft he can achieve by virtue of his position, will soon be discovered.

Many school districts have lost money because they neglected to have an audit of the financial books of their system. The auditing of books should be performed by a qualified person in his respective field, and not by a member of the board of education, or anyone who doesn't measure up to the qualifications exacted by the duty.

(9) (6) (38)

X. Unless a Special Property Department Has Been Organized, the Clerk of the Board of Education Shall Be Responsible for the Purchase and Distribution of All Supplies.

The clerk shall also act as purchasing agent for the board, unless the board should decide to divide the duties and appoint a purchasing agent. The clerk shall buy, under the direction of the board, the superintendent of schools, or any other executive officers concerned, all materials and supplies needed by the school department. Some of the specific things the clerk will be responsible to purchase are all text and supplemental books and supplies used in the schools. In some districts the clerk may, in cooperation with the librarian, set up rules and regulations on purchased books. Maintenance material such as fuel, janitor supplies, and building equipment, shall be purchased under the jurisdiction of the clerk.

In addition to purchasing the supplies, it will be the responsibility of the clerk to distribute the supplies to the proper departments.

(6) (7) (8) (9) (11) (14) (15) (20) (21) (24) (26) (28) (33) (36)

(37) (38)

XI. The Clerk of the Board of Education Shall Oversee Construction and Maintenance of All School Buildings.

One of the most important items in running the financial affairs of a school district is the proper maintenance of school buildings at a moderate cost. When a school district decides that a new school building should be constructed, it is the responsibility of the clerk to select and approve the sites for such buildings. The clerk should post notices for bids of contracts on new buildings; and when a bid is accepted, the clerk should notify all other contractors who submitted bids.

Inasmuch as the school plants are used for recreational and extra-curricular activities, it will be the responsibility of the clerk to plan and schedule the use of the plant for such activities. A limitation of compliance with this standard may depend upon the scope of the clerk's duties. Where there are several coordinating departments under the jurisdiction of the superintendent, the clerk's practices may have a very narrow scope.

(5) (7) (20) (21) (22) (37)

XII. All Non-Instructional Personnel Shall Be Recommended to the Superintendent for Employment or Dismissal by the Clerk of the Board of Education.

A good administrator may save much money by careful apportionment of man power. It should be the responsibility of the clerk to see that this careful apportionment is made through his recommendations to the superintendent. Lewis (22) gives many helpful suggestions in the use of manpower. He states that the use of temporary seasonal employees to relieve some of the peak load in the worst of heating seasons and the use of the custodial-engineering force during the summer will avoid much waste. The selection of help on the basis of

training, experience, and other qualities all help to make efficiency. The proper supervision of custodial-engineering help for improvement of firing and operation technique will also pay big dividends. The clerk should also give credit to those employees who are deserving of such credit. Again, a limitation of compliance with this standard may depend upon the scope of the clerk's duties.

(7) (20) (22) (37)

XIII. All Required Reports to the Public, County, and State Shall be Made by the Clerk of the Board of Education.

The clerk will be required to make many reports. Because the clerk is responsible for and has custody of the books of the school district, he is in the best position of any person in the school system to provide such reports.

The clerk shall make statistical reports to the state. Nearly every state's school laws require statistical reports of each and every school district. He also shall make a financial report to all superior county, state, and national officers. If the law requires that financial reports of the school system be made to the public, the clerk shall publish such a report in the newspaper and certify its authenticity.

At various times the board of education will call upon the clerk for required reports. An example of such reports are: transportation, and high school tuition reports.

(1) (2) (5) (6) (8) (9) (11) (14) (15) (16) (17) (27) (34) (38)

XIV. The Clerk of the Board of Education Shall Notify All Board Members of Board Meetings, and Attend Such Meetings Himself.

Inasmuch as the clerk is the recording officer of the board of education, he is expected to attend board of education meetings.

It is the responsibility of the clerk to notify all board members of board meetings; and, if possible, supply them with an outline of business to come up together with a resolution covering the same. This will greatly increase the business efficiency of the meeting.

If at any time the need arises for special meetings within the school district, the clerk shall notify all members concerned.

(2) (3) (5) (8) (9) (14) (15) (16) (17) (27) (34) (36) (41)

XV. The Clerk of the Board of Education Shall Record the Proceedings of the Board of Education's and Its Committees' Meetings.

Campbell (3) states that with 126,000 school districts in the United States the writing of school board minutes is an important procedure. He suggests the following steps should be taken to secure adequate minutes. (1) An agenda of procedures to be followed should be made up by the clerk and sent to every board member, clerk, and administrative officer. (2) If the school board is organized in committees, the clerk should attend every meeting and keep a record of all the committee transactions. If the board functions as a committee, the clerk should be there to record its proceedings. (3) As soon as practicable, following the board meeting, the clerk should prepare the minutes in their permanent form. (4) The clerk should make a copy of the minutes for each board member. This merely requires a request of approval at the next board meeting.

Campbell (3) suggests that the minutes be kept in a loose leaf binder preferably of letter size. The minute book should not be cluttered up with reports that are pasted in. Marginal headings showing the index of minutes by subject should be employed in writing the minutes, and they should show who made each motion, who seconded each motion, and the roll call on each motion.

(5) (2) (3) (8) (11) (14) (15) (16) (17) (27) (34) (36) (41)

XVI. The Clerk of the Board of Education Shall Sign and Have Custody of All Records of the Board of Education.

The records of a school system are about the most important documents the school system possesses. The custody of the records is the responsibility of the clerk. Some of the important documents in his custody are: the seal, contracts, securities, title papers, insurance policies receipts, bills, cancelled orders and warrants, cancelled bonds and coupons, records of annuitants, employees, teachers certificates, and records of district boundaries.

Because the records have such a great value, the school district should provide equipment where permanent records could be stored safely. This equipment should be fire resistant and burglar resistant. There isn't anything sadder than a school district that has lost its records and is floundering around trying to begin anew.

If the clerk resigns his position or is replaced, it is the responsibility of the clerk to deliver all records and books to his successor.

(5) (7) (8) (9) (12) (14) (15) (16) (17) (27) (34) (38) (41)

XVII. The Clerk of the Board of Education Should Keep Accurate and Complete Records That are Available to the Public at All Times.

To insure efficiency it is essential that the clerk keep accurate and complete records of receipts and expenditures. Nothing will add more to the efficiency than records kept in such a manner that they can easily be found and interpreted. All of the clerk's records should be open to the public to attain the best public relations possible.

(1) (2) (14) (15)

XVIII. The Clerk of the Board of Education Should Have an Educational Point of View.

The clerk must be a person who has an understanding of education as a moral, cultural, and political force. He should also have an educational philosophy of his own based preferably on some years of experience in the classroom or the principal's office.

The clerk must always respect the superintendent as the chief school executive, and must cooperate with the professional schoolmen and the board of education.

The clerk must remember that schools exist for the education of the child, and everything should be directed towards that goal. He must place the child's interests and educational purposes above his own business policies.

Finally, the clerk should have a definite knowledge of the general operation of the school system and adapt his business practices to that system.

(6) (10) (15) (18) (27) (29) (40)

XIX. It Would be a Distinct Asset for the Clerk of the Board of Education to be a College Graduate.

Roberts (33) thinks that, on the basis of current trends, it is very possible that the business executives will require at least six years of academic training. It will be regarded as a profession in the highest sense. Other school authorities think that four years of college will be imperative with courses in school organization and administration.

(6) (33) (38)

XX. The Clerk of the Board of Education Should Have Keen Business Sense Gained Through Experience or Courses in Management and School Business.

Roberts (32) correctly explained it when he said business will be

conducted in a manner, good or bad, according to abilities, training, and experience of those transacting the business.

A broad training for the clerk in school business should include courses in business administration, budgeting, accounting, financial training, purchasing and storing supplies, and courses in the use of records and reports.

(6) (15) (15) (20) (21) (22) (27) (29) (32) (38) (40)

XXI. The Clerk of the Board of Education Should be Familiar with and Utilize Business Methods.

In addition to being familiar with business methods, the clerk must be in sympathy with school work, or he may use the business methods to a disadvantage.

The clerk should be familiar with bonds, sinking funds, discounts, economics, sociology, and educational thought.

Good business administration requires that a 100 per cent value be obtained for every dollar of school money expended. A person who is technically trained in business methods has a much greater chance to achieve that goal than one who has no training in business methods.

(6) (18) (37) (38)

XXII. The Clerk of the Board of Education Should Have a Knowledge of the Functions Which He Is Expected to Fulfill.

The clerk should have a knowledge of every duty set up in the standards. By the term knowledge, it is meant the ability to perform the duties, or the willingness to seek ways and means of performing those duties that he doesn't have a knowledge of at present.

(6)

XXIII. The Clerk of the Board of Education Should Have Had Teaching Experience or Served Apprenticeship as a Subordinate in the School Business System.

Some authorities say that it is essential that the clerk have teaching experience so that he may have gained an educational philosophy of his own. Other authorities say this isn't necessary and that a system could be set up where the clerk can work up to a more important position based on merit and vacancies.

(6) (33) (40)

XXIV. The Clerk of the Board of Education Should Reflect a Broad Social Point of View.

In order to adapt his business practices to present conditions, the clerk should be a student of current economic and social problems. In his social and business contacts, the clerk should use wholesome political skills to his advantage. Here the accent is on wholesomeness.

A man who reflects a broad social point of view should be sensitive to the criteria which should be employed in the formulation of a long term functional school program.

(18) (27) (40)

XXV. In Order to be Efficient, the Clerk of the Board of Education must Possess Many Desirable Attributes.

The clerk should place honesty above everything else in his business dealings. He should be tactful and use common sense in his business as well as social relationships. A clerk who is not dependable should not be employed as the head of the business affairs of the school system.

The clerk should respect the community he lives in and be able to gain the respect of the community for himself.

The clerk must prove himself an efficient worker by being willing to dig for facts and tendencies, and to seek basic principles of right action in the solution of taxation, building, budgetary, pur-

chasing, and personnel problems.

(10) (27) (40)

XXVI. The Clerk of the Board of Education Shall be Appointed by the Board of Education Upon Recommendation of the Superintendent.

According to educational authorities the clerk should be under the jurisdiction of the superintendent; therefore, he should be nominated for appointment by the superintendent, subject to approval of the board.

The board should base its selection on qualifications and experience, and not by virtue of friendship or political affiliations.

It is probably a wise decision to select the clerk from without the board. Selecting a member of the board as clerk gives a little too much weight to one person's actions and decisions. In a recent survey (39), it was shown that the larger districts appoint a non-board member as clerk of the board while small districts appoint a board member.

(1) (2) (9) (11) (12) (14) (15) (17) (34) (30) (36) (39) (41)

XXVII. The Clerk of the Board of Education Should Recognize that the Superintendent Is the Chief Executive of the School System, and Is Responsible to the Board of Education.

Campbell (2) states that if two coordinate executives report to the school board, it is assumed that the two functions, finance and instruction, are equal in importance. This is not the case. The schools exist for the purpose of giving instruction, and everything else is instrumental to that end. Schools do not exist to make money, but to spend money for an instructional program. In order to keep his relationship the chief financial officer, or the chief executive of the school board must be the same person.

Hear (21) made a careful research of the problem and recommended largely on the basis of practices which had been found successful in business, that there be one executive responsible to the school board.

(2) (8) (9) (10) (15) (17) (19) (21) (27) (30) (36) (37) (40)

PART FIVE

PRACTICES IN UTAH SCHOOL DISTRICTS

The results of this study are based on the information received as of April 1947 concerning 35 clerks of the board of education in the state of Utah. Those replying constitute 87.5 per cent of the total 40 school board clerks in the state.

To show the extent to which replies were representative, the districts were divided into three different sizes. Twenty-five per cent of the districts with the largest school population* were placed in the large district category; 25 per cent of the districts with the smallest school population were placed in the small district section and the remaining 50 per cent fell in the medium sized group. This method of classification was used because of the fact that it is impossible to classify Utah's 40 school districts on a normal distribution curve and get any comparison between the intervals.

That the 35 clerks reporting represents a fair cross sectional view of the general practices in the small, medium, and large districts of the state is shown by table I**. The variation in practices due to size of district will be pointed out in all tables where possible.

Table I. Response to questionnaire - by size of district

Enrollment	Number of Districts		
	Reporting	Not reporting	Total
Large districts (4,859-32,978)	9	1	10
Medium districts (915-4,948)	17	3	20
Small districts (155-816)	9	1	10
Total	35	5	40

* The school population was taken from the twenty-fifth report of the superintendent of public instruction of the state of Utah for the biennial period ending June 30, 1944.

** One additional questionnaire was received from a medium sized district, but arrived too late to be included in the tabulation.

The questionnaire* was answered by both the clerk of the board and the superintendent of the same district. One page of the questionnaire was devoted to the superintendent's rating of the clerk and to questions whose answers were best supplied by the superintendent. Where the superintendent and the clerk were one and the same person this rating could not be obtained.

Legal status of the clerk of the board of education

As part of study made of the actual practices of the clerk, it is essential to know the legal aspect of the offices of clerk. The legal status of the clerk for this study is taken from the Utah statutes, section 75, chapter 11, paragraphs 3, 4, 6, and 15 (35). In addition to the actual statutes, the opinions of the attorney general on these statutes are given.

Utah statutes - Members of boards of education shall organize by electing from their number a president and a vice president whose term of office shall be for two years and until their successors are elected and qualified. Each board shall elect a clerk and a treasurer and their term of office shall be two years and until their successors are elected and qualified; provided, that the clerk may be elected by the board to serve as clerk and treasurer.

Before entering upon the discharge of his duties the clerk shall give a bond to the board of education of his school district in such sum as the board may prescribe, to be approved by the board, conditioned for the faithful performance of his duties, and he shall qualify according to law.

The oath of office and bond of the clerk shall be filed with the

* Appendix A

treasurer of the board and all others shall be filed with the clerk of the board, that is, the official bonds and oaths.

The clerk of each board of education shall attend all meetings of the board, shall keep an accurate journal of its proceedings, and have the care and custody of the seal, records and papers of such board not otherwise provided for, shall countersign all warrants drawn upon the treasurer by order of the board, and keep an accurate account of all moneys paid to the treasurer on account of the board and from what source received and of all moneys paid on orders drawn on the treasurer by order of the board. He shall prepare and submit to the board an annual statement, under oath, of the receipts and disbursements during the year ending June 30, which statement the board shall cause to be published in a newspaper having general circulation in the district showing:

1. The amount on hand at the date of the last report.
2. The amount of sinking fund, and how invested.
3. The money paid out, and for what paid, and in county school districts, also to whom paid.
4. The balance of school money on hand.
5. The number, date and amount of every bond issued and redeemed under authority, and the amount received therefor.

The clerk shall perform such other duties as the board or its committees may require. He shall receive for his services such compensation as the board may determine.

Opinions of the Attorney General - Contracts valid if signed by president and clerk of board if authority granted by board. In order to make the signatures legal, the contract must be adopted and approved by the board with specific authority granted by the board to the

president and secretary to sign the contracts on the board's behalf. Such authority should be part of the minutes of the board.

The board of education must reorganize at the first meeting in January, after their election to elect board members, by appointing a president, vice president, and clerk. If said election is not so held the incumbent clerk may rightfully keep possession of said office until his successor is elected and qualified.

The board cannot elect a clerk at the January meeting for less than a two year term.

The law requires the treasurer of the board to be bonded. However, the board can set the cost of the bond at quite a low amount so as to avoid any considerable expense.

When the office of clerk and treasurer is combined the board of education has the authority to designate the amount and the number of bonds to be filed. It is within the board's power to require only one bond for a person serving as clerk and treasurer. The board of education designates who should hold the bond.

Evaluating and descriptive analysis of practices of Utah school board clerks

This section is devoted to the analyzation of the data received from the questionnaire. The practices will be compared, wherever possible, with the criteria and variations due to size of district, mode of appointment, and whether the clerk is a full or part time employee will be pointed out.

Bonding of the Clerk - Utah's law states that before entering upon the discharge of his duties the clerk shall give a bond to the board of education of his school district in such sum as the board may prescribe, to be approved by the board, conditioned for the faithful per-

formance of his duties, and he shall qualify according to law. Every district reporting in this survey required such a bond of the clerk.

This conformity is very high with the standard used as evaluating criteria*.

Auditing of books - Sixteen clerks have their books audited bi-annually while 19 clerks have their books audited annually. The size of the district had very little effect on the frequency of audit. It was, however, pointed out by some of the larger districts that a continual audit was going on, but the clerks were only required to make an official report of the audit annually or biannually whichever the case might be. Six of the eight part time clerks had books audited biannually, while two part time clerks' books were subject to an annual audit. Whether the clerk was directly appointed by the board or not did not seem to have any effect on the frequency of the audit.

This shows only fair conformity with the standard set-up as evaluating criteria**.

Employment of personnel - The clerk of the board of education does not recommend non-instructional personnel for employment in any of the 34 districts reporting. This may be due to the limit placed on the responsibilities of the clerk. The practice definitely lacks conformity with the standard set-up as evaluating criteria***.

Purchase and distribution of supplies - The responsibility of purchasing and distribution of educational supplies is assumed by 17 out of 35 clerks. These clerks, with the exception of one, resided in medium and large districts. One of the 17 clerks was a part time

* Conformity is high where 90 per cent or more clerks perform the duties.

** Fair conformity represents 50-90 per cent of clerks performing duty.

*** Anything below 50 per cent performance is designated as lack of conformity.

clerk, but he was also acting as superintendent. The superintendent nominated for appointment 10 of the 17 clerks who assumed this responsibility. This might be an indication that the superintendent nominated those persons who can relieve them of some of their duties.

Eighteen out of 35 clerks assume the responsibility of purchasing and distribution of maintenance supplies of the school system. Two part time clerks who were also acting as superintendent, executed this duty. The majority of the clerks who perform this function are in medium sized districts. It seemed to make no difference in the frequency of performance of this duty if the clerk was nominated for appointment by the superintendent or directly appointed by the board.

As a whole, this practice achieves fair conformity with the standard set up as evaluating criteria.

Responsibilities on construction and maintenance of school buildings -

Only one part time clerk was in charge of construction of new school buildings. This clerk was from a small district and was directly appointed by the board of education.

Responsibility for repairs on school buildings was assumed by only one clerk from a medium sized district. The clerk who discharged this duty held a full time position and was nominated for appointment by the superintendent.

This practice definitely lacks conformity with the standard set-up as evaluating criteria, but may be due to the limit placed on the responsibilities of the clerk.

Sex of clerk - It is interesting to note whether the clerk of the board is a man or a woman. This study showed that 12 were women and 23 were men.

Clerk's relationship to superintendent and board of education -

Eleven clerks said they were directly responsible to the superintendent; 12 were directly responsible to the board of education. Clerks from 10 districts answered that they were directly responsible to both the superintendent and the board of education. The fact that 10 clerks did answer that they were directly responsible to both indicates that there is not a clear cut definition of to whom the clerk should be responsible. All but two of the 15 clerks nominated for appointment by the superintendent were directly responsible to the superintendent. The size of the district had no effect on the relationship of the clerk to the superintendent or the board.

The practice in regards to relationship of the clerk to superior officers definitely lacks conformity with the standard set-up as evaluating criteria.

Location of clerk's office - The questionnaire indicates that in most cases the office of the clerk is located in the city administration building, the county court house, the school board office, or the high school building. This covered 33 out of 34 districts reporting. One office was located in the clerk's home. This office was in a small district.

If a separate space has been set aside for the office of the clerk and equipped with facilities to perform his duties, it would show that the districts are attaching some importance to the office of the clerk of the board of education.

Table II. The extent of bond posted by the clerk*

Amount of Bond	Number of clerks	Mean of bond	Mean of revenue handled
\$ 1,000—4,999	9	\$ 1,944.44	\$ 177,038
5,000—9,999	8	5,000.00	597,262
10,000—14,999	7	10,000.00	559,012
15,000—19,999	---	---	---
20,000—24,999	2	20,000.00	741,036
25,000—29,999	2	25,000.00	1,153,212
Total	28		

The extent of the bond of the clerk is shown by a frequency distribution containing six intervals with the mean bond and the mean of revenue handled by the clerk in each interval.

Nine clerks posted a bond of \$1,000 to \$4,999 with a mean bond of \$1,944.44. The mean revenue handled by these same clerks was \$177,038. Of the nine clerks two held part time positions, and two were nominated for appointment by the superintendent. The clerks falling in this interval came from medium and small sized districts.

A bond of \$5,000 was posted by eight full time clerks who handled a mean revenue of \$597,262. The clerks were equally divided among large and medium size districts. Four of the eight clerks were directly appointed by the board of education.

Five full time, and two part time clerks who were also acting as superintendent posted a bond of \$10,000 each, and were responsible for a mean revenue of \$559,012. The superintendent nominated for appoint-

* One clerk who posted a bond of \$50,000 was left out of the frequency distribution.

ment four of these seven clerks. The majority of the clerks in this interval were from medium sized districts.

No clerks posted a bond ranging in amount from \$15,000 to \$19,999.

A bond ranging from \$20,000 to \$24,999 was posted by two full time clerks. The average revenue these clerks handled was \$741,036. All clerks falling in this category held full time positions and all were nominated for appointment by the superintendent.

Two clerks posted \$25,000 bonds and handled a mean revenue of \$1,153,212. Both of these clerks were full time and were nominated for appointment by the superintendent. One of these was from a large district and the other from a medium sized district.

As a whole, there seems to be no direct relationship between the amount of the bond posted and the revenue handled by the clerk. There is a slight tendency for clerks in large districts to post a higher bond, but many exceptions can be seen. This indicates that the bond is mainly a fidelity bond for faithful performance of duty.

Table III. The extent the oath of office is taken and administered by the clerk

	Answered yes	Answered no	Total replies
1. Oath of office taken by the clerk	25	8	33
2. Oath of office taken by board members	33	2	35
3. Clerk administered oath to board members	21	12	33

Table II indicates that 25 out of 33 clerks reporting take an oath of office. Seven of the eight clerks who did not take an oath were from medium sized districts, while one was from a large district. All of the clerks not taking the oath were full time clerks, except

one who was also acting as superintendent. The superintendent nominated three of the clerks for appointment who did not take an oath, while the board directly appointed the other five who are not required to take an oath.

An oath of office was taken by board members in 33 out of 35 districts reporting. The oath of office was not taken by board members in two medium sized districts. Both of these districts appointed full time clerks. Where the oath of office was not taken by board members, the superintendent nominated the clerk for appointment in one district, while the board directly appointed the other clerk.

The clerk administered the oath of office to board members in 21 out of 33 districts. Ten of the 12 clerks who did not perform this duty were from medium sized districts. Two of the 12 reporting that the clerk did not administer the oath held part time positions. Six of the 12 not performing the duty were directly appointed by the board, while six not performing the duty were nominated for appointment by the superintendent. Two clerks not performing this duty were acting as both superintendent and clerk.

As a whole, a significant* number of the clerks who did not perform the above duties came from medium sized districts and held full time jobs.

The practice in regards to the duties has fair conformity with the standard set-up as evaluating criteria.

* The term significant is used in those cases where the writer thought that percentage of non-performance was large compared with the total number of clerks in the three variables; namely, size of district, mode of appointment, and full or part time position.

Table IV. Secretarial duties performed by the clerk

	Perform duties	Do not per- form duties	Total replies
1. Official board correspondence	21	13	34
2. Clerical work pertaining to office	32	3	35
3. Statistical work pertaining to office	30	5	35

Official board correspondence is taken care of by 21 out of 34 clerks in Utah. Four of the clerks not executing the duty were from small districts; four were from medium sized districts; and five from large districts. Of the 13 clerks who did not perform the duty, four held part time jobs, and nine full time jobs. Two of the part time clerks were also acting as superintendent. The superintendent nominated for appointment five of the clerks not performing this duty, while the board directly appointed eight clerks not executing this duty. One clerk reported that not all of this correspondence was handled by the clerk.

The clerk discharged the clerical work of his office in 32 out of 35 districts reporting. Two of the three clerks not performing the duty were from large districts, while the third one was from a small district. The board directly appointed two of the clerks not performing the duty, and the superintendent nominated one for appointment. Of the clerks who did not do the clerical work of his office, one held only a part time job, the other two were full time employees.

Statistical work pertaining to the office is not done by five clerks out of 35. Three of the clerks were from small districts while two were from large districts. Two part time and three full time clerks did not perform the duty. The superintendent nominated

for appointment one clerk who was not responsible for this duty, while the board appointed four clerks who were not responsible for the same duty.

The practices in regards to secretarial duties has only fair conformity with the standard set-up as evaluating criteria.

A significant number of clerks not performing secretarial duties come from small and large districts, and a decided majority of those not executing this duty were directly appointed by the board of education.

Table V. Legal duties assumed by the clerk

	Assume re- sponsibility	Not re- sponsible	Total replies
1. Legal aspect of school property insurance	31	4	35
2. Legal proceedings relating to real estate, or school property	22	12	34
3. May consult school attorney	29	6	35

The legal aspect of school property insurance is the assumed responsibility of 31 out of 35 clerks. Three clerks in small districts, and one clerk in a large district did not assume this responsibility. Of the clerks who did not perform this duty, three were directly appointed by the board, and one was nominated for appointment by the superintendent. The responsibility was not assumed by one part time clerk and three full time clerks.

All proceedings concerning the legal aspect of real estate or school property are the responsibility of 22 clerks. Of the 12 clerks who did not perform the duty, three were part time clerks, and nine were full time clerks. One part time clerk was acting as both super-

intendent and clerk. Eight clerks not performing the duty were directly appointed by the board, while four not performing the same function were nominated for appointment by the superintendent. Clerks of six small districts, three medium sized districts and three large districts did not discharge this function. One clerk was in doubt as to whether or not this was a duty of the clerk.

The clerk may consult the school attorney in 29 out of 35 districts reporting. Three part time clerks and three full time clerks do not consult an attorney. The superintendent nominated for appointment one clerk who does not consult the school attorney, while the board directly appoints five that do not. Of the six who do not consult the school attorney, three are from small districts and three are from medium size districts. This may indicate the smaller districts do not have a school attorney. Two of the clerks not consulting the school attorney were also the superintendent.

In comparison with the standard set-up as evaluating criteria, fair conformity can be seen in regards to practices of a legal aspect.

A much larger percentage of large and small districts do not require their clerks to perform duties of a legal aspect. Board appointed clerks have a more decided percentage of non-performance of legal duties than do clerks nominated for appointment by the superintendent. This may indicate that the boards assume the responsibility themselves.

Table VI. Documents that are certified by the clerk of the board

	Certifies	Does not certifies	Total replies
1. Taxation requirements	32	3	35
2. School election returns	34	1	35
3. Signature of president of the board	29	5	34
4. Copies of board resolutions	34	1	35
5. Claims against board of educa- tion	33	1	34

The taxation requirements of the district are certified by 32 out of 35 clerks. Of the three clerks who do not certify taxation requirements, two were from medium sized districts, and one was from a small district. All three clerks were full time clerks and were directly appointed by the board of education.

One full time clerk out of 35 did not certify school election returns. This clerk was from a large district and is directly appointed by the board.

The signature of the president of the board is certified by 29 out of 34 clerks. All five of the clerks not executing this duty were appointed directly by the board. Two part time clerks and three full time clerks were not responsible for this duty. One of the part time clerks was also acting as superintendent. The clerks in three medium sized districts, one small district, and one large district did not perform this duty. According to one clerk, this duty is done under a notary public.

From a total of 35 replies only one clerk did not certify copies

of board resolutions. The lone exception was a part time clerk from a medium sized district who was also acting as superintendent. This clerk was directly appointed by the board. He made a notation in his reply that a full time clerk was being prepared for that position.

Claims against the board of education were certified by 33 out of 34 clerks reporting. Again the lone exception was from a medium sized district. The clerk who did not discharge this duty was a full time clerk and was directly appointed by the board. It was stated by one clerk that this duty was sometimes performed but not always.

There seems to be a very direct relationship between non-performance of certification duties and clerks directly appointed by the board of education.

The practices in regards to this responsibility achieves high conformity with the standard set-up as evaluating criteria.

Table VII. Inventories and census that are the responsibility of the clerk

	Responsible for	Not responsible	Total replies
1. Inventory of school property	23	12	35
2. Inventory of equipment and supplies of the school	21	14	35
3. School census	29	6	35

There does not seem to be any clear cut responsibility expected of the clerk in regards to duties concerning inventories and school census.

Only 23 out of 35 clerks reporting are responsible for an inventory

of school property. Of the 12 not responsible, six are from small districts, four are from medium districts, and two are from large districts. Six of the 12 are part time clerks. The superintendent nominated two clerks for appointment who did not execute the duty, while the board directly appointed 10 who did not perform the same duty.

An inventory of equipment and supplies of the school is not kept by 14 out of 35 clerks. Of the 14 clerks, seven held part time jobs, and seven were full time employees. The superintendent nominated for appointment three clerks who did not perform the duty while the board directly appointed the remaining 11. Six of the 14 clerks were from small districts, and five and three clerks came from medium and large sized districts respectively.

The school census is the responsibility of 29 clerks reporting. One part time clerk, and five full time clerks reported this was not their responsibility. Of these six, five were from large districts, and one was from a small district. The board directly appointed three clerks who did not perform the duty while the superintendent nominated the other three for appointment.

There seems to be no definite relationship between those clerks who do not execute the duty and mode of appointment.

The practice in regards to inventories and the school census achieves fair conformity with the standard set-up as evaluating criteria.

It does not seem, however, that part time clerks as a whole do not make inventories. This may be due to lack of time and facilities. There also seems to be a tendency for large district clerks not to

be responsible for the school census. This may be too great a responsibility for a clerk in a large district.

The non-performance of duties relating to the school census and inventories seems to be due to all three variables being studied. Part time clerks, board appointed clerks, and clerks from small and large districts have a significant frequency of non-performance.

Table VIII. Administrative activities performed by the clerk

	Clerk's responsibility	Not responsible	Total replies
1. Execute official documents in his official capacity	32	3	35
2. Administer the retirement of bonds	32	1	33
3. May call meetings of the board	15	20	35
4. Delegated administrative authority	11	23	34

In 32 out of 35 districts, the clerk executes official documents in his secretarial capacity. Two small districts, and one medium sized district do not require their clerks to discharge this duty. Two of the three clerks who did not perform this duty were full time clerks. Of those not responsible for the duty, one was nominated for appointment by the superintendent, and two were directly appointed by the board.

Clerks from all but one district reporting were required to administer the retirement of bonds. The one clerk who does not perform this duty is a full time clerk from a medium sized district. He received his appointment directly from the board.

The authority to call meetings of the board under certain conditions is obtained by only 15 out of 35 clerks. Seven of these 15 who have been delegated authority are nominated for appointment by the superintendent. Eight are appointed directly by the board. Of these 15 clerks, two are part time clerks, and 13 are full time employees. One of the part time clerks is also acting as superintendent. The majority having authority to call meetings come from medium sized districts, nine to be exact, although 3 clerks come from large districts and three from small districts.

Administrative authority is delegated to only 11 clerks out of 35. Two part time clerks, and nine full time clerks were delegated administrative authority. One clerk was acting as both clerk and superintendent. Of the 11 clerks who performed this duty, five were from medium sized districts, four from large districts, and two from small districts. The board of education appointed five of the clerks who were given authority, while the superintendent nominated for appointment six who obtained administrative authority. One clerk reporting stated that occasionally administrative authority was delegated to the clerk.

It seems that the clerk performs those administrative activities which pertain to documents of his office, but he is not delegated authority of a nature that would allow him to become an administrative officer.

As a whole the practices of the clerk in regards to administrative activities has fair conformity with the standard set-up as evaluating criteria.

Table IX. Financial duties performed by the clerk

	Frequency of performance	Not performed	Total replies
1. Draws up and signs warrants for all monies	33	1	34
2. Approves all bills for materials and services	21	14	35
3. Submits proposed budget to county commission	21	14	35
4. Prepares a tentative budget	6	28	34
5. Approves and signs school board contracts	25	6	31
6. Keeps an account with the tax collector	27	7	34
7. Reports at board meetings the tax accounts and finances	31	3	34
8. Keeps financial accounts of school	31	4	35
9. Approves payroll of teachers and employees	23	10	33
10. Has custody of books covering financial transaction of school district	32	3	35

Utah's law states that the clerk shall countersign all warrants drawn upon the treasurer by order of the board. All but one clerk out of 34 reporting executed this duty. This clerk was a full time clerk from a medium sized district who received his appointment directly by the board.

Approval of all bills for materials and services was made by 21 clerks. The size of the district didn't have any effect on the requirement of this duty. All but one clerk not discharging this duty were full time clerks. Five of the 14 replying negatively were

nominated for appointment by the superintendent. The low percentage of clerks who perform this duty may be due to the fact that the final approval of all bills must be made by the board of education.

Twenty-one out of 35 clerks submit a proposed budget to the county commission. There was great variation in the size of districts of those who did not perform this duty. Of the 14 not required to do this duty, four were part time clerks, and three were nominated for appointment by the superintendent. One part time clerk was acting as superintendent and clerk.

Only six clerks out of 34 prepared a tentative budget. Four of the six were nominated for appointment by the superintendent, and all six held full time positions. Those clerks who perform this duty are mainly from medium sized districts. One clerk was in question as to whether or not this was required of the clerk. In the majority of districts, the responsibility must undoubtedly be left to the superintendent.

School board contracts are approved and signed by 25 out of 31 clerks. Those not requiring this duty were mainly from medium sized districts. Two of the six were nominated for appointment by the superintendent, and all but one not executing the duty were full time clerks. The one part time clerk was also a superintendent. The clerks from four districts said that they signed school board contracts but did not approve them.

Keeping an account with the tax collector was the responsibility of 27 clerks. One part time clerk who was also acting as superintendent did not perform the duty, and two of the seven not executing this duty were nominated for appointment by the superintendent. All sizes

of districts were included in those not discharging this duty. In one district, the clerk kept an account with the tax collector only when authorized.

The clerks in 31 out of 34 districts are required to report tax accounts and finances at board meetings. Two clerks from small districts and one from a medium sized district did not perform this duty. All clerks not doing said duty were directly appointed by the board and two were part time clerks. One of the part time clerks was also acting as superintendent. The law says that the clerk shall keep an accurate account of all moneys paid to the treasurer, from what source received, and all money paid out by the treasurer by order of the board. It seems that this duty should have had 100 per cent fulfillment.

Again, it seems that all clerks should keep the financial accounts of the school, but this survey shows that four out of 35 do not keep these accounts. All four were full time clerks. One of the four was nominated for appointment by the superintendent. Clerks from two medium sized districts, and two large districts did not keep the financial accounts of the school.

Payrolls of teachers and employees are approved by 23 out of 35 clerks. The fulfillment of this duty wasn't limited to any one size of district. Eight full time and two part time clerks did not execute this duty. One part time clerk was also acting as superintendent. The superintendent nominated for appointment three of the 10 who did not perform the duty. Two clerks said they sign the payroll but do not approve them.

Three clerks out of 35 reporting do not have custody of books

covering the financial transactions of the school district. The three clerks were in all three sized districts. Two of the three were directly appointed by the board, two were full time clerks, and one held only a part time position. It would seem that if the law says that the clerk should keep an accurate account of incoming and outgoing money, that all the clerks should have custody of the financial accounts of the school.

As a whole, the practice in regards to finances has fair conformity to the standard set-up as evaluating criteria. This study shows there is a lack of consistency in the performance of financial duties.

The mode of appointment seems to have an influence on performance of financial duties with clerks directly appointed by the board showing a decided majority of non-performance.

Table X. Reports prepared by the clerk

	Responsibil- ity assumed	Not re- sponsible	Total replies
1. Make statistical reports to the state	31	4	35
2. Publish board reports and notices	33	2	35
3. Make all statistical reports required by law	31	4	35
4. Make financial reports to state and national officers	34	1	35

Clerks in 31 out of 35 districts make statistical reports to the state. Three who do not are full time clerks, and one is a part time clerk. Two of the four are nominated for appointment by the superintendent. The size of the district hasn't any effect on the performance of this duty.

Board reports are published by clerks in 33 out of 35 districts. Both of the clerks not performing this duty are full time clerks. One is directly appointed by the board, and one is nominated for appointment by the superintendent. Of the two clerks not executing the duty, one is from a large district and one is from a small district.

Thirty one out of 33 make all statistical reports required by law. One of the four clerks not performing this duty is a part time clerk. The superintendent nominated two clerks for appointment who are not required to discharge the duty, while the board directly appointed the other two. One clerk noted that with the aid of the superintendent, he made all statistical reports required by law. Three of the clerks not discharging the duty are from a medium size district, and the fourth clerk is from a small district.

All but one of the 33 clerks reporting make financial reports to state and national officers. The one who does not is a part time clerk from a small district who is appointed directly by the board of education. The law requires that the clerk make an annual statement under oath of all receipts and disbursements.

The practices have a high conformity with the standard used as evaluating criteria. Variations of practices seem to be due to other factors than those with which this study is concerned.

Table XI. The clerks responsibility in regards to attending and notification of meetings

	Responsible	Not responsible	Total replies
1. Notify board members of board meetings	30	5	35
2. Post notices for special meetings	29	5	34
3. Clerk is expected to attend all board meetings	35	0	35

Notifying board members of board meetings is a requirement of clerks in 30 out of 35 districts reporting. Two out of five clerks who do not perform this duty are part time clerks and two are nominated for appointment by the superintendent. The size of the district makes no difference on this matter.

Clerks in 29 out of 34 districts in Utah post notices for special meetings. Again, the size of the district makes no difference. Two of the clerks not performing this duty are part time clerks, and three are directly appointed by the board.

Every clerk in every district reporting is expected to attend all board of education meetings. This is a requirement of the law.

The practice in regards to attendance and notification of meetings has a high conformity with the standard set-up as evaluating criteria. It seems peculiar that 100 per cent of the clerks are not required to notify board members of board meetings.

The frequency of performance of the above duties appears to be influenced by whether or not the clerk holds a full or part time position, with a significant percentage of part time clerks not executing the duties.

Table XII. The minutes that are recorded and provided to board members by the clerk

	Clerk responsible	Clerk not responsible	Total replies
1. Records of proceedings of board meetings	35	0	35
2. Records of proceedings of committees of board	25	7	32
3. Provides minutes of meetings to board members	26	8	34

The clerk of the board of education records the proceedings of the board in every district reporting. This duty is required by law.

He records the proceedings of committees set-up by the board in 25 out of 32 districts. The seven reporting in the negative are from the large and medium sized districts. Some of these districts may not have had any committees, but all but one of the clerks are full time, and most of them have assistants. The part time clerk was also a superintendent. One of these clerks is nominated for appointment by the superintendent, and six are directly appointed by the board.

Minutes of board meetings are provided to board members by 26 out of 34 clerks. Those who do not provide minutes are mainly from medium sized districts. Four of the eight not executing this duty are full time clerks and have very little or no assistants. Two of the clerks not performing this duty are acting as both clerk and superintendent. One is nominated for appointment by the superintendent, while seven are directly appointed by the board. It seems that greater efficiency could be achieved at board meetings if the clerk

had provided members with previous meeting's minutes. It would save much time and allow present and pressing problems to be presented without delay.

The above practices have a fair conformity with the standard set-up as evaluating criteria.

A significant number of clerks directly appointed by the board do not perform these duties.

Table XIII. Records which are signed and kept by the clerk

	Affirmative replies	Negative replies	Total replies
1. Has custody of records of the board including seal, contracts, title papers, bills etc.	34	1	35
2. Has records of annuitants	28	4	32
3. Has records of board employees, past and present	30	4	34
4. Has records of certification of teachers in the district	24	11	35
5. Has records of receipts and expenditures	34	1	35
6. Signs records of board	32	1	33
7. Keeps records open to public	35	0	35

All but one of the clerks in the 35 districts reporting have custody of records of the board including the seal, contracts, securities, documents, title papers, record books, insurance policy receipts, bills, cancelled orders, warrants, cancelled bonds and coupons. One part time clerk from a small district who was appointed directly

by the board did not discharge this duty. This seems to be a violation of the law as the clerk is required to perform this duty by law.

Clerks in 26 out of 32 districts are responsible for records of annuitants. Those not responsible for this duty are three clerks from small districts and one clerk from a medium sized district. All are appointed by the board and two of these are part time clerks.

Records of past and present employees are kept by 30 out of 34 clerks in Utah. The size of the district does not seem to effect performance of this duty, but one district was in doubt as to whether or not this duty was required of the clerk. Two part time clerks and one clerk who was nominated for appointment by the superintendent were not required to keep these records.

The clerk has custody of records of certification of teachers in their districts in 24 out of 35 districts reporting. More than half of the districts not requiring this duty are in the large sized districts. Two part time clerks and four nominated for appointment by the superintendent are not required to execute this duty.

All but one of the 35 clerks reporting have custody of receipts and expenditures. One medium sized district did not require this duty. He is a full time employee appointed by the board. Here again the law states that the clerk shall keep an account of all receipts and expenditures, and there should be no reason why they shouldn't be in his custody.

Thirty-two out of 33 districts reporting require their clerks to sign records of the board. Again, one medium sized district did not require this duty of their part time clerk. This clerk was also acting as superintendent.

All the districts reporting require their clerks to keep their records open to the public. This may be done in the annual statement which must be published in a local newspaper.

As a whole the practice of the above duties shows high conformity with the standard set-up as evaluating criteria.

The size of district and mode of appointment seem to have an influence on frequency of performance of duties regarding records. Clerks from medium sized districts perform these duties decidedly more often than clerks from other districts. Clerks nominated for appointment by the superintendent perform these duties more frequently than do clerks appointed directly by the board. There is a slight tendency for part time clerks not to execute these duties as much as full time clerks, but the difference is not too significant.

Table XIV. Compensation received by Utah school board clerks

Salary	Number of clerks	Mean of salary
\$ 1,700 - \$ 1,999	3	\$ 1,800.00
2,000 --- 2,299	4	2,135.00
2,300 --- 2,599	4	2,470.00
2,600 --- 2,899	2	2,800.00
2,900 --- 3,199	4	3,001.25
3,200 --- 3,499	3	3,309.00
3,500 --- 3,799	2	3,600.00
3,800 --- 4,099	3	3,801.33
Part time position*	5	785.00
Total	32	2,515.59

* Four clerks were also superintendents, and only one out of the four gave a separate salary for the clerk. Thus three clerks who were also superintendents are not considered in the part time position category.

It seems that the salary paid the clerk might give some indication of how much school business officials are considered as a profession.

Four clerks received a salary of between \$1,700.00 and \$1,999.00 with a mean salary of \$1,800.00. Three of these four clerks were from small size districts. One position was only part time, and all four clerks were directly appointed by the board.

Salaries of between \$2,000 and \$2,999 were received by four full time clerks. The mean salary for this group was \$2,133. One of the four was nominated for appointment by the superintendent. These clerks resided in three medium sized districts and one small district.

Four full time clerks received salaries of between \$2,300 and \$2,599 with a mean salary of \$2,470. One of the clerks was from a large district, while the remaining ones were from medium sized districts. Half of the clerks were nominated for appointment by the superintendent, while the board directly appointed the other two.

Table XIV indicates that two clerks receive a salary of \$2,800. Both are full time clerks. The superintendent nominated one for appointment, while the board directly appointed the other. One was from a large district, and one from a small district.

Four clerks from medium sized districts received a salary of between \$2,900 and \$3,199 with a mean salary of \$3,001.25. The superintendent nominated for appointment all four of these clerks.

The superintendent nominated four out of five clerks who received salaries of between \$3,200 and \$3,499 with a mean salary of \$3,309. All of the clerks in this category held full time positions. Of this salary group, three clerks were from medium sized districts, and two

resided in large districts.

Two clerks from large districts were receiving a salary of \$3600 each. Both clerks held full time positions. One was directly appointed by the board and one was nominated for appointment by the superintendent.

The superintendent nominated for appointment two of three clerks who received salaries ranging from \$3800 to \$4099 with a mean salary of \$3801.53. All three held full time positions, and resided in large districts.

Five clerks reporting held only part time positions. They received a mean salary of \$785. These clerks were all directly appointed by the board and resided in medium and small size districts.

The mean salary for the 27 full time clerks is \$2836.07, while the mean salary for all 32 full and part time clerks is \$2513.59.

There seems to be a tendency for clerks to receive higher salary if they have held their position for a longer period of time. The clerks who received a salary of \$2900 or over had a mean tenure of 11.56 years while the clerks who had received a salary of \$2899 or less had only a mean tenure of 7.55 years. Four of the clerks who indicated their salary in table VIII did not mention the number of years they had held their position, and therefore, could not be used in calculating the above tenure. Also the tenure of the part time clerk was not taken into consideration.

There seems to be a tendency for those clerks receiving higher salaries to be nominated for appointment by the superintendent. Of the clerks receiving salaries of \$2900 or over, 73 per cent are nominated for appointment by the superintendent.

The highest paid clerks are from the larger districts.

Table XV. The number of years the clerk has held his present position

Years	Number of clerks	Mean tenure
0 - 4	16	2.29
5 - 9	3	6.50
10 - 14	4	11.50
15 - 19	2	16.50
20 - 24	1	22.00
25 - 29	0	----
30 - 34	3	30.67
35 - 39	1	37.00
Total	30	9.54

Table XV shows the tenure of the clerk indicated in a frequency table of eight intervals. The mean tenure is shown for each interval.

Sixteen clerks had served in present office of clerk from 0-4 years, with a mean of 2.4 years. The size of the district did not have any effect on the tenure of this group. Three of these were part time clerks and nine were nominated for appointment by the superintendent. One part time clerk was also superintendent.

Positions of from five to nine years with a mean of 6.5 years were retained by three clerks. Two of these were from small districts and one from a medium sized district. All were full time employees and two were directly appointed by the board.

Four clerks had held their positions from 10-14 years with a mean of 11.5 years. Three of the four clerks were from medium sized

districts, while the other one was from a small district. One of these was a part time clerk acting as superintendent and one was nominated for appointment by the superintendent.

One part time clerk from a small district and one nominated for appointment by the superintendent from a large district had held their jobs from 15 to 19 years with a mean of 16.5 years. One full time clerk from a large sized district, appointed by the board had held his position for 22 years.

There were no clerks who had held their position as a clerk for a period of 25 to 29 years.

Full time clerks from 3 districts held their positions for 30 to 34 years with a mean of 30.67 years. Two of the three were from medium sized districts while the third was from a large district. One was nominated for appointment by the superintendent.

For 37 years one full time clerk from a medium sized district had held his position. He was directly appointed by the board.

There seems to be no relationship between length of tenure and number of years of schooling attained above high school.

Table XVI. Equipment used in the clerk's office.

	Has available facilities	Facilities not available	Total replies
1. Typewriter	35	0	35
2. Copy of school laws	35	0	35
3. Telephone	32	3	35
4. Equipment to store permanent records.	32	2	34

Although no evaluating criteria was set up concerning the facilities of the clerk's office, it is interesting and important to see if the clerk's office contains those facilities which enable him to perform more efficiently the duties of his office.

All the clerks reporting have typewriters and a copy of the school laws.

Three clerks do not have telephones. All are appointed by the board. Two are from small districts and one is from a medium sized district. Two are part time clerks.

Equipment to store permanent records are not available to two clerks in Utah. One was a part time clerk from a small district and one a full time clerk from a medium sized district.

The majority of the clerks not having facilities are from smaller districts and are part time clerks. This would indicate that the variations are due to these factors.

Table XVI shows that the clerk's offices are well equipped as a whole. This tendency seems to indicate that the school districts are attaching some importance to the office of clerk of the board of education.

Table XVII. The academic achievement of the clerk

Years of schooling	Number of clerks
Not a high school graduate	1
High school graduate	7
1 year above high school	9
2 years above high school	2
3 " " " "	4
4 " " " "	4
5 " " " "	2
6 " " " "	0
7 " " " "	2
Total	34

The number of years of school the clerks have attained may or may not indicate the competence of the clerk.

One full time clerk from a small district was not a high school graduate. He was directly appointed by the board and has had his position for ten years.

Clerks in seven out of 34 districts reporting were high school graduates. The size of the district had little effect on this item. Two are part time and three are nominated for appointment by the superintendent. All but two of these clerks had held their position for over ten years.

One year of schooling above high school was obtained by nine clerks. All but one of these are from small and medium sized districts. One of these is a part time clerk. Superintendents nominated for appointment two of the clerks in this category.

Schooling two years above high school was obtained by five clerks from medium and large districts. All were full time and four were nominated for appointment by the superintendent.

Four clerks had obtained three years of schooling above high school. The size of the district had no effect on this level. One was part time and one was appointed for nomination by the superintendent.

Clerks from four districts had four years of schooling above high school. Three were from medium sized districts and one was from a large district. All were full time employees and three were nominated for appointment by the superintendent. One clerk had held his position for 30 years and the rest for two years.

Five years of schooling above high school were obtained by two clerks. One was from a large and one was from a small district. One was nominated for appointment by the superintendent, while the other was a part time clerk who was also acting as superintendent.

There were no clerks who had secured six years of schooling above high school.

Two clerks from medium sized districts had seven years of schooling above high school. One was a part time clerk and one was appointed by the board. The part time clerk was also acting as superintendent.

The mean number of years of schooling above high school obtained by clerks who were directly appointed by the board is 1.65 years, while the mean number of years obtained by clerks nominated for appointment by the superintendent is 2.56 years. This excludes two clerks who were also acting as superintendents.

It is interesting to note that a few part time clerks have attained

more years of schooling than the majority of full time clerks. This is undoubtedly due to the factor that four part time clerks are acting as superintendent and would be required to have that schooling for such a position.

Table XVIII. Miscellaneous data concerning the clerk

	Affirmative replies	Negative replies	Total replies
1. Clerk is also treasurer	19	14	33
2. Clerk's position is full time job	27	8	35
3. Place child's interest above business policies	26	2	28
4. Is the clerk also a teacher	0	32	32
5. Clerk holds other position in school system	10	25	35
6. Clerk had teaching ex- perience	12	20	32

The clerk holds the position of both treasurer and clerk in 19 out of 33 districts reporting. Of the 14 who are not treasurer, three are part time, one of which was also superintendent, four are nominated for appointment by the superintendent. The size of the district had no effect on the number of clerks holding two positions.

A full time position is held by 27 out of 35 school board clerks in Utah. All but three of the clerks having only a part time position came from districts in the small group size. Four of the eight part time clerks are also acting as superintendent. One clerk who was also acting as superintendent said that the position of clerk was a full

time position. This seems to be an obvious error and this position of clerk has been assumed to be a part time position throughout the study.

It is of great importance and value to the school system that the clerk place the child's interests above his business policies. This survey showed that 26 did, two did not, and one superintendent replied, "Usually". One superintendent marked this questionable. The two who did not were full time clerks appointed by the board. One was from a small and one from a large district. This might indicate that the clerk doesn't realize that the school exists for the child and his interests and needs should be placed first and foremost. As a whole, this practice shows high conformity to the standard used as evaluating criteria.

None of the 33 clerks reporting held a teacher's position at the same time as being clerk. There was no exception. However, 12 out of 32 had previously had teaching experience. A lack of conformity with the standard exists in regards to this qualification.

Ten out of 31 clerks reporting held another position in the school system, but the size of the district had no effect on this practice. In many cases the other position held in the school system is assumed to be the position of treasurer.

Table XIX. Source of competence of the clerk

	High School	College	Experience
1. Accounting and business methods	17	19	24
2. Management	5	13	21
3. Finance	4	15	21
4. Management of supplies	2	7	20
5. Records and reports	9	15	22
6. Bonds and sinking funds	2	11	20
7. School administration and organization	2	10	16
8. Economics and taxation	9	13	17
9. Sociology	9	12	12
10. Inventories	2	10	21
11. Transportation	2	3	21

Seventeen clerks had achieved competence in accounting and business methods through high school courses, while 19 clerks had taken college courses in the same subjects. Experience in accounting and business methods had been gained by 24 clerks.

College courses in management had been obtained by 13 clerks, while only five clerks had a high school course on the same subject. Twenty-one clerks, through experience, had gained competence in management.

Experience in finances was the chief source of competence for 21 clerks. Fifteen clerks had college courses in finances and four had such courses in high school.

Only two clerks had a high school course in the management of supplies. Seven had college courses dealing with the same subject. Experience was designated by 20 clerks as their source of competence in regards to management of supplies.

Inasmuch as the clerk is required by law to keep many records and make reports, he should be well qualified to perform this duty. This study showed that 22 clerks said they were qualified in this regard through experience. Fifteen had college courses and nine had high school courses dealing with records and reports.

Every clerk should have a knowledge of bonds and sinking funds. Ten clerks had college courses and two had high school courses in this subject. Again, experience provided the major source of competence when 20 clerks named this as their source.

It is very desirable and even essential that the clerk have an educational point of view. A knowledge of school administration and organization was achieved by 16 clerks through experience. This knowledge was gained by 10 clerks through college courses, and by two clerks by means of a high school course.

Nine clerks had high school courses in economics and taxation. Thirteen had college courses in this subject. Through experience 17 clerks had gained a knowledge of it.

Competence in sociology was attained through experience by 12 clerks. Twelve clerks had college courses and nine had high school courses in sociology.

Only two clerks had high school courses on inventories and ten had such college courses. Twenty-one clerks stated that experience had been their source of knowledge of inventories.

In many Utah school districts students are transported to and from school by bus. Therefore, it would seem advisable and essential in many cases that the clerk have a training in transportation. Twenty-one were qualified in transportation by virtue of experience. College courses provided three clerks with this knowledge and high school courses provided two clerks with it.

Table XIX indicates that while many clerks had had both high school and college training, experience is still the main source of competence of the clerk.

Inasmuch as it is not the purpose of the writer to say whether experience, or academic training is the better; it can be seen that the qualification as a whole have a fairly high conformity with the standard on qualifications set up as evaluating criteria.

The source of competence seems to be due to other factors than size of district, mode of appointment or full or part time positions which are the variables that have been compared throughout this study.

Table XX. Superintendent's ratings of the clerk

	Superior	Above average	Average	Below average	Total replies
Broad social point of view	10	10	9	—	29
Honest	26	4	—	—	30
Common sense	16	10	4	—	30
Tactful	10	12	6	1	29
Efficient worker	17	9	3	—	29
Willingness to search for facts and tendencies	12	15	4	1	30
Willingness to seek for basic principles of right actions in the solution of taxation, building, budget- ing, purchasing and person- nel problems	14	8	6	—	28

The clerk acts as a public relations officer between the board, school and community. In order to be efficient in this work along with being the business agent of the board, the clerk should possess many desirable attributes. Probably the most able person who could rate the clerk fairly is the superintendent, because they are constantly in contact with each other. A four point scale consisting of superior, above average, average, and below average was used to rate the clerk.

A superior rating was given ten clerks in regards to having a broad social point of view. Ten clerks were said to be above average, while nine were average in respect to this attribute. Four of seven

clerks from small districts were rated average, while 62½ per cent of the clerks from the large districts were rated superior. The majority of the clerks rated superior were nominated for appointment by the superintendent. More part time clerks were rated average than above average or superior.

Twenty-six clerks were rated superior in honesty, while the remaining four were rated above average. Of the four clerks, three were from medium sized districts and one from a small district. Three of the four held full time positions, and all were directly appointed by the board.

Common sense was a superior attribute of 16 clerks. Above average rating was given to ten clerks in regards to common sense, while four were rated average. Again seven out of nine clerks from large districts were rated superior, while the clerks from the medium sized and small districts were fairly well distributed over the three ratings. More part time clerks were rated in the average category than under the other two ratings. Superior ratings were given by the superintendent to nine clerks who were nominated for appointment by the superintendent. In the above average, and average category the superintendent nominated 50 per cent of the clerks receiving such a rating.

Ten clerks were rated superior as being tactful. A below average rating was received by one clerk; an average rating was given six clerks, and 12 were rated above average. The size of the district had very little effect on this rating except the one clerk who received a below average rating. He was a full time clerk from a small district and was directly appointed by the board. Eight out of 10 clerks rated superior were nominated for appointment by the superintendent, while seven out of 19 that fell under the above average, average and below

average were nominated by the superintendent. Here again, more part time clerks were rated average rather than in any other category.

The superintendents in 17 districts rated their clerks as superior workers, while nine clerks were rated above average, and three were rated average. There didn't seem to be any variation due to whether the clerks were a full or part time employee, but a larger percentage of clerks residing in the large districts were rated higher than clerks residing in medium or small districts. The superintendent's nominee for appointment also was rated higher than those who were directly appointed by the board.

The board directly appointed four clerks who received a rating of average as to willingness to search for facts and tendencies. One full time clerk from a medium sized district who was nominated for appointment by the superintendent was rated below average in this regards. A superior rating was received by 12 clerks, and 13 were rated above average in their willingness to search for facts and tendencies. All nine of the clerks in the large districts fell in the upper two ratings, while the clerks from the medium and small districts were scattered over all of the scale. Fourteen of the 25 clerks receiving superior or above average ratings were nominated for appointment by the superintendent.

A willingness to seek basic principles of right actions in the solution of taxation, building, budgeting, purchasing and personnel problems was a superior attribute of 14 clerks. An above average rating on this attribute was received by eight clerks, while six clerks were rated average. The mode of appointment of the clerk, and whether he held a full or part time position didn't seem to have any

effect on the way he was rated. Again, clerks from the large districts fell in the upper two points of the scale, while clerks from the medium and small districts were fairly well distributed over all points of the scale. One remark was made that a willingness to seek basic principles of right actions in the solution of these problems was the superintendent's responsibility and not that of the clerk.

As a whole, it seems that clerks from large districts were rated slightly higher than clerks from medium and small districts. Also, clerks nominated by the superintendent were given higher ratings by the superintendent than those who were directly appointed by the board. However, this should be natural because the superintendent should think quite highly of a man before he ever recommends him for such a position. The variation due to being a full or part time clerk didn't seem to have any effect on how the clerk was rated.

In comparison with the standard set-up as evaluating criteria, the clerks in Utah have a fairly high degree of desirable attributes from a standpoint of superintendent's ratings on the clerk.

Table XXI. The amount of assistance that is given the clerk

	Number of clerks
No assistants	13
Part time assistant	5
1 assistant	9
2 assistants	6
3 assistants	2
Total	35

Many clerks have assistants to help them because the office of

clerk has so much clerical and statistical work.

Thirteen clerks from medium and small districts had no assistants. Six of these were full time employees.

Part time assistants were available to five full time clerks in medium sized districts.

One full time assistant worked for each of nine clerks from medium and large sized districts. Four of these were only part time clerks.

Six full time clerks from large districts had two full time assistants.

Three clerks from large districts had three assistants.

As a whole, it can be seen that the large sized districts require more work from their clerks; and, therefore, provide them with additional help.

Table XXII. Methods of selecting the clerk

	Affirmative replies	Negative replies	Total
1. Appointed by board of education	31	0	31
2. Nominated by superintendent subject to approval of board	15	10	25
3. Holding position because he is superintendent or principal	1	23	24
4. A member of the board of education	0	26	26
5. The superintendent	4	23	27
6. Secretary to superintendent	4	24	28

Every board of education in every district appoints a clerk. This has 100 per cent unanimity because it is a requirement of the law.

From 25 clerks reporting, only 15 were nominated for appointment by the superintendent subject to the approval of the board. In this study those clerks who didn't state that they were nominated for appointment by the superintendent were assumed to be directly appointed by the board. Four of the 10 clerks appointed directly by the board held part time positions. One of the four was acting as superintendent. The majority of clerks directly appointed by the board of education came from small districts.

Only one clerk held his position because he was superintendent or principal. This clerk was from a medium sized district and was directly appointed by the board. Inasmuch as he was also superintendent, the position of the clerk was a part time position.

None of the clerks reporting were members of the board of education.

Four clerks were acting as superintendent. One of these said that although the superintendent was acting as clerk, the position of clerk was a full time position. This position was assumed as part time for this study. A veteran was now being trained to fulfill that position. Of these clerks, three were from medium sized districts and one from a small district.

The secretary to the superintendent was the clerk in four districts. All four were full time clerks and resided in medium sized districts. The superintendent nominated for appointment three of the four clerks falling in this category.

The practices have high conformity with the standard set-up as evaluating criteria wherein the clerk is appointed by every board, but definite-

ly lacks conformity where the superintendent nominated the clerk
subject to the approval of the board.

PART SIX

CONCLUSION

An extensive review of literature in the field of school administration and school business administration resulted in the formulation of criteria used in the evaluation of the practices and functions of the clerk of the board of education. These criteria may serve as guides in professionalizing this educational officer. A survey of the practices in 35 out of 40 Utah school districts reporting, when analyzed in the light of the criteria, show practices which have been grouped under three general headings: (1) those showing considerable lack of conformity with these evaluative principles, (2) those showing fair conformity, and (3) those showing a high degree of conformity.

In addition to comparing practices with evaluative criteria, variations of practices were analyzed in the light of three variables: (1) size of district, (2) mode of appointment, and (3) full or part time position.

1. Practices showing considerable lack of conformity to evaluative criteria.

No clerk is responsible for the employment of non-teaching personnel.

Only three per cent of the clerks reporting are in charge of construction and maintenance of school buildings in the school district where they resided.

Less than one-half of the clerks are nominated for appointment by the superintendent and considered themselves directly responsible to the superintendent.

Approximately one-third of the clerks have teaching experience,

but none are serving as a teacher and clerk at the same time.

2. Practices showing fair conformity to criteria.

Slightly over one-half of the clerks have their books audited annually or continuously. Others use less frequent audits.

Fifty per cent of the clerks are responsible for the purchasing and distribution of supplies.

Approximately three-fourths of the clerks reporting took an oath of office and administered oath to other officials.

Seventy-nine per cent of the school board clerks perform secretarial duties pertaining to their office.

Approximately one-fourth of the clerks reporting do not perform duties of a legal nature.

Slightly more than two out of every three clerks are responsible for inventories concerning the school properties and for the administration of the school census.

Sixty-six per cent of the clerks perform administration activities of some kind.

Approximately three-fourths of the clerks reporting are held responsible for the financial transactions of the school district.

Six out of every seven clerks are responsible for the recording and keeping of board minutes and any minutes of committees set up by the board.

3. Practices showing high conformity to the criteria.

Every school board clerk in every district is required to post a bond.

Slightly more than 93 per cent of the clerks certify documents which require certification.

More than nine out of every 10 clerks are responsible for the financial and statistical reports concerning the school district.

Ninety per cent of the clerks notify board members of meetings and attend such meetings themselves.

More than nine out of every 10 clerks sign and have custody of the official records of the school district.

With regard to educational philosophy two of the 36 clerks reporting, according to opinions of the superintendent, would not place the interest of the child above their business policies.

A large majority of the clerks attained a knowledge of business methods through experience of courses in high school and college.

Nearly all the practices which have high conformity to the standards are specified by law.

4. Variations in practices due to size of district.

Clerks from medium size districts do not take an oath of office or administer oath to new board members or other officials as often as clerks from small and large districts.

Duties of a legal aspect are not performed as frequently by clerks from small districts as by clerks from other sized districts.

Medium sized district clerks perform more duties concerning secretarial work, inventories and school census, and signing and keeping records than do clerks from small and large districts.

5. Variations in practices due to mode of appointment.

The clerks that are directly appointed by the board execute with less frequency duties concerning certification, minutes, finances, records, inventories and school census, legal matters, and secretarial work.

Clerks that are nominated for appointment by the superintendent have higher academic achievements than do clerks directly appointed by the board.

6. Variations in practices due to full or part time position of the clerk.

Duties pertaining to taking an oath of office and administering the oath to other officials are performed less frequently by full time clerks.

Part time clerks execute with less frequency duties concerning inventories and school census. Attendance at board meetings and notification of board members of school board meetings are also done less frequently by part time clerks.

PART SEVEN

RECOMMENDATIONS

As a whole the office of the clerk of the board of education rates high with respect to a number of the standards, but in order to achieve professional standing more importance will have to be attached to the position of clerk.

One method by which high conformity may be achieved is by having the state school board association establish an organization by which clerks must be certified in order to hold the position. The state school board association could then have specified by law or by a book of rules and regulations: (1) definite qualifications that can be expected of any person holding the office, (2) clear cut responsibilities which should be performed by the clerk, and (3) a definite policy of to whom the clerk should be responsible. The clerk should undoubtedly be under the jurisdiction of the superintendent with the unit type of organization prevailing.

If this were carried into effect, persons with higher qualifications should be secured for the position; and the salary and tenure of the office should be made to commensurate with the qualifications and duties expected of the office.

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APPENDIX A

Dear Superintendent:

Would you please supply the information asked for below, and return it in the stamped envelope enclosed. This data is needed for a study of the clerk of the board of education in the state of Utah. Tabulated returns will be available as soon as replies are received.

Dean Andrew

Mr.
Name of clerk: Mrs..... Date.....
Miss..... District.....

DUTIES RELATING TO:

	<u>Yes</u>	<u>No</u>
<u>Bonding</u>		
1. Is the clerk bonded?.....		
2. If so, for how much?.....		
<u>Oath of office</u>		
1. Is oath of office taken by:		
a. Clerk?.....		
b. Members of the board of education?.....		
2. Does the clerk administer oath to board members?.....		
<u>Secretarial</u>		
1. Does the clerk handle all:		
a. Official board correspondence?.....		
b. Clerical work pertaining to his office?.....		
c. Statistical work pertaining to his office?.....		
<u>Legal matters</u>		
1. Is the clerk in charge of:		
a. School property insurance?.....		
b. Legal proceedings relating to real estate, or school property?.....		
2. May the clerk consult the school attorney on legal matters?.....		
<u>Certification</u>		
1. Does the clerk certify:		
a. Taxation requirements?.....		
b. School election returns?.....		
c. Signature of the president of the board on contracts, and notes?.....		
d. Copies of board resolutions?.....		
e. Claims against the board of education?.....		
<u>Inventories and census</u>		
1. Is the clerk responsible for:		
a. Inventory of school property?.....		
b. Inventory of equipment and supplies of the school?.....		
c. School census?.....		
<u>Administrative activities</u>		
1. Does the clerk:		
a. Execute official documents in his secretarial capacity?.....		
b. Administer the retirement of bonds?.....		
2. May the clerk call meetings of the board under certain conditions?.....		
3. Is administrative authority delegated to the clerk?.....		

	Yes	No
<u>Finances</u>		
1. Does the clerk:		
a. Draw up and sign warrants of all monies?.....		
b. Approve all bills for materials and services?.....		
c. Keep the financial accounts of the school?.....		
d. Submit proposed budget to county commission?.....		
e. Prepare a tentative budget?.....		
f. Approve and sign school board contracts?.....		
g. Keep an account with the tax collector?.....		
h. Report at board meetings the tax account and finances?.....		
i. Approve the payroll of the teachers and employees?.....		
2. Are the books covering financial transactions of the school department in custody of the clerk?.....		
<u>Auditing of books</u>		
1. Does the clerk have his books audited:		
a. Annually?.....		
b. Biannually?.....		
<u>Purchasing and distribution</u>		
1. Is the clerk responsible for purchase and distribution of:		
a. Educational supplies?.....		
b. Maintenance supplies?.....		
<u>Construction and maintenance</u>		
1. Is the clerk in charge of:		
a. Construction of school buildings?.....		
b. Repairs on school buildings?.....		
<u>Employing of personnel</u>		
1. Does the clerk recommend for employment and dismissal of all non-instructional personnel i.e. janitors, repair and engineering forces?.....		
<u>Reports</u>		
1. Does the clerk:		
a. Make statistical reports to the state?.....		
b. Publish board reports and notices?.....		
c. Make all statistical reports required by law?.....		
d. Make financial reports to state & national offices?.....		
<u>Notification of meetings</u>		
1. Does the clerk:		
a. Notify board members of board meetings?.....		
b. Post notices for all special meetings?.....		
2. Is the clerk expected to attend all board of education meetings?.....		
<u>Recording of minutes</u>		
1. Does the clerk record proceedings of:		
a. The board of education?.....		
b. Committees set-up by the board of education?.....		
2. Does the clerk provide minutes of meetings to board members?.....		

	Yes	No
<u>Records</u>		
1. Is the clerk responsible for the custody of:		
a. Records of the board including the seal, contracts, securities, documents, title papers, record books, insurance policies receipts, bills, cancelled orders, warrants, cancelled bonds and coupons?.....		
b. Records of annuitants?.....		
c. Records of board employees, both past and present?.....		
d. A record of certificates of teachers in the district?.....		
e. A record of receipts and expenditures?.....		
2. Does the clerk:		
a. Sign records of the board?.....		
b. Keep his records open to the public?.....		
<u>Miscellaneous</u>		
1. What is the salary of the clerk?.....		
2. For how many years has the clerk held his present position?.....		
3. Where is the office of the clerk located?.....		
4. Does the clerk's office contain:		
a. A typewriter?.....		
b. A copy of the school laws?.....		
c. A telephone?.....		
d. Equipment to store permanent records?.....		
5. How many years of schooling above high school has the clerk had?.....		
6. Has the clerk had teaching experience?.....		

PLEASE CHECK () THE ITEMS THAT INDICATE THE SOURCE OF COMPETENCE OF THE CLERK IN EACH OF THE FOLLOWING AREAS:

	Courses in		
	H. S.	College	Experience
Accounting & business methods			
Management			
Finances			
Management of supplies			
Records & reports			
Bonds & sinking funds			
School administration & organization			
Economics & taxation			
Sociology			
Inventories			
Transportation			

WILL THE SUPERINTENDENT PLEASE RATE THE CLERK ON THE FOLLOWING ITEMS?

	Superior'	Above Average'	Average'	Below Average
Broad social point of view				
Honest				
Common sense				
Tactful				
Efficient worker				
Willingness to search for facts and tendencies				
Willingness to seek basic principles of right actions in the solution of taxation, building, budgeting, purchasing, and personnel problems				

	Yes	No
1. Is the clerk also the treasurer?.....		
2. What assistants does the clerk have?		
3. Is the position of clerk in your district a full time job?.....		
4. Will the clerk place the child's interest above his business policy?.....		
5. Is the clerk a teacher?.....		
6. Does the clerk hold any other position in the school system?.....		
<u>Clerk relationship to the superintendent and the board of education</u>		
1. Is the clerk directly responsible to the:		
a. Superintendent?.....		
b. Board of education?.....		
<u>Methods of selection of the clerk</u>		
1. Is the clerk:		
a. Appointed by the board of education?.....		
b. Nominated by the superintendent, subject to approval of board?.....		
c. Holding his position because he is superintendent or principal?.....		
d. A member of the board of education?.....		
e. The superintendent?.....		
f. The secretary of the superintendent?.....		

If any material for distribution has been published concerning the office of the clerk in your district, will you please send me a copy.